


TO: Distribution

DATE: May 28, 1996

FROM: Market Information / Bruce Neidle SUBJECT: MSA Monthly Topline Report - April 1996

During the latest three months PM's shipment share advanced +0.8 points versus three months-ago to 47.6%. Performance benefited primarily from Marlboro promotional shipments and record high retail takeaway associated with the Marlboro/Basic Spring Special in March and April (consisting of money-off and special promotional product offers). PM's share of the Premium category advanced +1.2 points versus 3 months-ago to a record high of 56.2%. In addition to Marlboro's growth, PM's category performance likely benefited from relatively stable competitive premium promotional shipments.

- PM's share during the latest 3 months advanced +0.8 points versus 3 months-ago to 47.6%, with Marlboro and Basic gains more than offsetting Cambridge and OPB losses.
- Marlboro's share during the latest 3 months moved +1.1 points ahead of 3 months ago to 32.0%. Lights packings accounted for nearly two-thirds of the franchise's growth during this time period.
- The Discount category declined -0.2 points on a 3 month basis to 29.0%. Cambridge experienced the largest loss (-0.2 points). The three leading discount entries (Basic, Doral and GPC) were the only major discount products to post a share gain (of at least +0.05 point) during this period.
- Basic's share of industry was up +0.2 points during the latest 3 months to 4.9%, while its share of category advanced +0.6 points to 17.0%. Basic's performance reflected introductory pipe-line volume and promotional shipments associated with the three new Basic Box packings and MBSS related retail takeaway gains.

#### Competitive Developments

- Among the major competitive premium brands, Camel, Salem and Kool experienced the largest share losses during the latest three months (declining at least -0.1 point each).
- Newport continues to drive Lorillard's growth, advancing +0.1 point during the latest three months to 5.9%, its highest level to date.

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